BUAD 345 Investment Analyses

Fall

Dr. Enyang Guo

**Typical Student Grade Report for a Stock-Trak Simulation Project**

**Student Name: XXXX**

As it indicated in the syllabus, your grade for the project will be based upon ***your learning efforts*** at managing the portfolio, and it includes:

1. How many trades you made and your trading frequencies during the three month trading period.
2. Your efforts to try new methods learned from the course, and the strategies and adjustments you made during your investment period.
3. Your presentation in class and the hand-in portfolio, and your final report and account statements from the *Stock-Trak* Inc. which explain you’re trading activities and the performance of your portfolio.

**The following is the data collected that reports what you have done for the project as displayed in Stock-Trak:**

You registered your account at the beginning of the trading on Stock-Trak and completed 228 trades during the 12 week trading period; while the class average is 130 trades. The trading activities reported below demonstrate your effort in learning and managing your portfolio.

You did a good job!

The following table reports your week by week trading number for the 12 week project period:

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The following are the reports of your portfolio value, your class rank, and the Sharp ratio of your portfolio. The market value of your portfolio on November 22 when we wrapped up this project is $4,375,298.31while, for the same time period, the value of the money market fund (that earns interest rate only) is $5,033,397.35 and the value of the S&P 500 portfolio is $5,526,004.76. The Sharp ratio of your portfolio is negative, -1.08, at the close. However, your portfolio value and the Sharp ratio do show a significant improvement in the last two weeks of the trading period.

Portfolio value:

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Class rank:



Sharp ratio:



The peer evaluation about your presentation is as follows

Content: How informative and relevant is the presentation?

 A B C D

 ***27***  *No. of inputs*

Clarity: How clear is the presentation?

A B C D

***27*** *No. of inputs*

Overall: The overall quality of the presentation

A B C D

 ***27***  *No. of inputs*

Your presentation was highly appreciated by your classmates and the hand-in report was well prepared.

Your final report well summaries the lessons you learned through the trading. You put a lot of efforts in this project, and your resilient efforts in learning should be commended. You did a good job!

**Your final grade of the project is A.**